Benefit Election Tutorial

Step	Action
1.	Log onto your PeopleSoft INSTEP State Employee Portal at:**www.in.gov/spd/instep** If you do not have your PeopleSoft User ID and Password, contact the IOT Helpdesk: (317) 234-HELP (4357) OR (800) 382-1095.
2.	Click the **Human Resources** link and a new page will populate. Human Resources
3.	Click the **Enter Elections** button. Enter Elections
4.	Review your personal information. If you need to add or update: • your home or mailing address, click the yellow Change home/mailing addresses button; • your phone numbers, click the yellow Change phone numbers button; • your emergency contacts, click the yellow Change emergency contacts button; • your e-mail addresses, click the yellow Change e-mail addresses button; Click the **Save** button and the **OK** button after each change. After all information has been updated, click the Return to Personal Information link to return to the Personal Information Summary page. NOTE: If any changes to marital status, employee information, or ethnic groups are required, contact your agency human resources department, so they may update their records.
5.	Click the **Proceed to Benefits Enrollment** button. Proceed to Benefits Enrollment
6.	Click the **Select** button to enter Benefit Elections. Select
7.	Click the **Edit** button. Edit

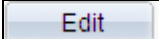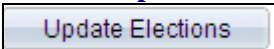| Step	Action
8.	Click the radio button next to the plan name in which you wish to enroll. If you do not wish to enroll in a plan you can select the Waive option. For this example we will choose the CDHP Plan 2 Before Taxes. Click the **Consumer Driven Hlth Plan 2 BT** option.
9.	Scroll Down to view the Dependent information listed below.
10.	Review the dependents listed toward the bottom of the page. Previously enrolled dependents will appear in the list. **You know your dependent is enrolled in the plan when the Enroll check box is marked.** To add or make changes to dependents, click the Add/Review Dependents button. To add a dependent, click the **Add/Review Dependents** button.
11.	For this example the new employee doesn't have any dependents listed. Click the **Add a dependent or beneficiary** button.
12.	Complete the following personal information section for each dependent. **Note:** Entering a **Date of Birth** (over the age of 26) for any dependent will make them ineligible for coverage. If a dependent relationship has changed, contact the Benefits Hotline to make the change; **DO NOT** add duplicate information to correct/change relationship or status.
13.	Once you have entered all of your dependent information, be sure to save. Click the **Save** link.
14.	**You know your dependent is enrolled in the plan when the Enroll check box is marked.** Click the **Checkbox** next to Joe Finn.
15.	Click the **Update Elections** button to review your election information.

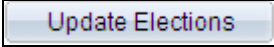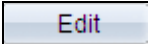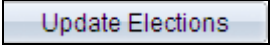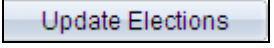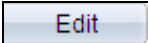| Step	Action
16.	Click the **Update Elections** button to continue. Update Elections
17.	Employees selecting a CDHP will have to verify eligibility by reviewing the requirements and selecting either Yes or No. For this example the employee is eligible for an HSA. Click the **Yes** button. Yes
18.	If you selected a Consumer Driven Health Plan (CDHP), click the www.HSATowerbank.net link to complete the Towerbank application. The employer code is **100366**. You will need the social security numbers and birthdates of all beneficiaries and authorized signers.
19.	Click the **www.HSA.Towerbank.net** link. www.HSA.Towerbank.net
20.	Return to complete this process after you have successfully submitted your benefit elections to ensure PeopleSoft doesn't expire.
21.	Select which HSA plan you wish to enroll and enter your annual contribution amount, if any. Click the **HSA 2 & CDHP 2 Before Tax** option. ○
22.	You can elect to contribute up to the maximum total contribution. For this example we have selected $1,000 to contribute annually.
23.	Click the **Update Elections** button to review your election information. Update Elections
24.	Click the **Update Elections** button to return to the Enrollment Summary page. Update Elections
25.	You will notice that your HSA amount is reflected next to the Health Savings Account "New" coverage. We will now continue to edit Dental. Click the **Edit** button. Edit

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26.	For this example we choose to elect the before tax option. Click the **Delta Dental Before Tax** option.
27.	Scroll down the page to enroll your Dependents in this plan if needed.
28.	Click the checkbox next to **Joe Finn.**
29.	Click the **Update Elections** button to review your election information. Update Elections
30.	You can review the total cost of Dental coverage from this page. Click the **Update Elections** button to return to the Enrollment Summary page. Update Elections
31.	Scroll down to continue with elections.
32.	Next we will select Vision coverage. Click the **Edit** button. Edit
33.	Scroll down to view options.
34.	For this example we will choose the Vision Coverage Before Tax. Click the **Anthem Blue View VSN Select BT** option.
35.	Please ensure that you enroll all dependents that are eligible. Click the **Checkbox** next to Joe Finn.
36.	Click the **Update Elections** button to review your election information. Update Elections
37.	Click the **Update Elections** button to return to the Enrollment Summary page. Update Elections

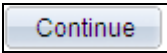| Step	Action
38.	Next we will continue to enroll into Basic Life Insurance. Click the **Edit** option. Edit
39.	Click the **Basic Life TaxSaver ($51,000)**. ⊙
40.	Be sure to allocate the percentage for beneficiaries.
41.	Click the **Update Elections** button to review your election information. Update Elections
42.	Click the **Update Elections** button to return to the Enrollment Summary page. Update Elections
43.	Next we will continue to enroll into Supplemental Life Insurance. Click the **Edit** button. Edit
44.	Click on the scrollbar to view all the options.
45.	For this example we will select the **Supplemental Life- 50K ($50,000)** option. ⦿
46.	Scroll down the page to review dependents.
47.	Be sure to allocate the percentages for beneficiaries.
48.	Click the **Update Elections** button to review your election information. Update Elections
49.	Click the **Update Elections** button to return to the Enrollment Summary page. Update Elections
50.	Next we will continue to enroll into Dependent Life Insurance. Click on the scrollbar.
51.	Click the **Edit** button. Edit
52.	For this example we will select the **Dep. Life Children Only 10K ($10,000)** option. ⊙
53.	Click on the scrollbar and scroll down the page to add dependents.

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54.	Click the **Checkbox** next to the Daughter relationship. ☐
55.	Click the **Checkbox** next to the Son relationship. ☐
56.	Click the **Update Elections** button to review your election information. Update Elections
57.	Click the **Update Elections** button to return to the Enrollment Summary page. Update Elections
58.	Click on the scrollbar to confirm benefit elections.
59.	Click the **Submit** button. Submit
60.	Click the **I Agree** option to accept or **I Disagree** option to decline for the Non-Tobacco Use Agreement. For this example we will accept the agreement and click the **I Accept** option. ○ I Accept
61.	Click the **Checkbox** in the Payroll Deduction Authorization box. ☐
62.	Click the **Submit** button to send your final choices. Submit
63.	After you click the **OK** button a new page will populate with a **Benefits Statement** and **AS-47** hyperlink. OK
64.	Click the refresh button until the **Status** column for the **Benefit Statement** and **AS-47** show posted. Click the **Refresh** button.
65.	Once the **Status** has changed a new page or tab will be available showing the elections you just made. Print the statement and review it carefully. If there are any errors, you will need to contact the Benefits Hotline immediately for assistance. Click the **Benefit Confirmation Statement** link.

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66.	Review the Current Benefits Statement to ensure all elections were entered correctly.
67.	Scroll down this page to review dependent information and tobacco agreement confirmation. Click on the scrollbar.
68.	Close the window by clicking on the X in the top right corner of the browser or close the tab. Click the **Close** button. ❌
69.	Click the **AS-47 Non-OE Events** link. A new page or tab will be available with your deductions listed. You will need to print, sign and submit the form to your agency's payroll department immediately to ensure your deductions begin timely. AS-47 - Non-OE Events
70.	Click on the scrollbar.
71.	Please print and sign this document so you can submit to your agency's payroll department immediately.
72.	Close the window by clicking on the X in the top right corner of the browser or close the tab. Click the **Close** button. ❌
73.	Click the **Continue** button to return to the main Benefits Enrollment page. Continue
74.	Click the **Sign out** link in the upper right hand corner to close your PeopleSoft session. Sign ou
75.	This concludes the Benefit Election tutorial. Please contact the Benefits Hotline with any additional questions or concerns. Employees outside of the Indianapolis area can call toll free 1-877-248-0007. **End of Procedure.**